

0910.04 Access to Stored Records

Issued January 1, 1994

SUBJECT: Access to Stored Records.

APPLICATION: Executive Branch Departments and Sub-units.

PURPOSE: To prescribe procedures that will allow agencies to gain access to the records they have stored in the State Records Center, and allow them to reference, retrieve and return records as necessary.

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SUMMARY: Records stored in the State Records Center still belong to the originating agency. Agencies have full right and opportunity to access, reference and retrieve individual documents, files or boxes of records as required. They also may return retrieved records and add new records to those records already in storage. The State Records Center maintains security over the records. Access is available only to representatives of the respective agency that owns the record, or to other persons who may be authorized specifically by the agency.

APPLICABLE FORMS: DMB-501, Records Transmittal Form.
DMB-508, Records Referral Order Form.
DMB-509, Records Referral Outcard.

PROCEDURES:

Agency:

- Referencing a record, or a records referral, occurs when a client agency requests that the State Records Center pull a document, file, or one or more containers of records from storage, so the agency may acquire information from it.
- May receive the needed information in various ways, such as:
 - Having the Records Center relay the needed information via telephone, or a copy of the needed documents, if of reasonable amount, by mail. Facsimile service also is available, where urgent service is needed for a limited number of documents.
 - May send a representative to the Records Center to view the requested records. The name of the representative will be given to Records Center staff when the referral request is made. The Records Center has ample space set aside as a customer referencing area. POSITIVE IDENTIFICATION, such as driver's license or State of Michigan identification card, is required of anyone coming to the State Records Center to reference or retrieve records.
- Retrieving Records:

- A records retrieval occurs when an agency requests to have a document, file, or 1 or more containers of records removed from the State Records Center and returned back to the agency.
 - May receive records from the State Records Center by I.D. or U.S. mail, or may send a representative, with proper identification, to the State Records Center to pick up the records.
- Permanently Out:
 - After retrieval of records, returns them to the State Records Center within a short time. If not to be returned, informs the State Records Center so that the Center may classify the records as "permanently out."
 - May retrieve records at a regular retrieval, with the intention of returning them to the Records Center, and then find a need to keep them in the office for an extended time. When records have not been returned to the Records Center after 1 year from the date of retrieval, the Records Center will classify them as "permanently out."
 - When returning records to the Records Center which have been classified as "permanently out," acquires a new lot number and submits a Records Transmittal to the Records Center as if they were a new lot of records (Procedure 0910.03).
 - Making a Referral or Retrieval Request:
 - Determines which lot and container to request by referring to the proper Records Transmittal listing those records.
 - May ask to reference or retrieve only a single file or document from a container, without having to retrieve an entire box.
 - May submit its request for a records referral or retrieval either by calling the State Records Center at (517) 335-9132 or by submitting a written request.

NOTE: Due to the large number of telephone requests received at the Records Center, in order to accommodate other incoming calls, there is normally a limit of 7 items which can be requested per telephone call.

 - Makes requests for referencing or retrieving large numbers of items by completing a Records Referral Order Form (DMB-508), along with corresponding Records Referral Outcards (DMB-509), and forwarding them to the State Records Center for processing. These forms may be obtained by calling the State Records Center at (517) 335-9132.
 - Refiles:
 - A refile is a document, file, or container which has been retrieved from the State Records Center and is being returned back into storage.
 - May not remove notations made on documents, rolls of microfilm, engineering drawings, files or other items removed from storage by the State Records Center staff, indicating lot and container number and storage location from an item before returning it back for storage. (If it is necessary to put it into a new file folder, wrapper, etc., return this lot, container and location information with the item.
 - May return a small item, such as only a few documents or files, via Interdepartmental (I.D.) or U.S. mail, or deliver them in person with no advance notice.

- Must call the State Records Center at (517) 335-9132 and request that 1 or more boxes of records be picked up.
 - Provide the number of boxes to be picked up, and the exact location. The pickup information will be relayed to Mail and Delivery Services, and a pickup will be scheduled for only the number of boxes specified. If the agency places any additional boxes at the pickup site, they will not be taken.
- Interfiles:
 - An interfile is a new document, file, roll of microfilm or other item that is to be added to a container of records which already is in storage. Any item to be interfiled must be of the same type (same Retention and Disposal Schedule item number) and have the same inclusive dates as the container into which it is to be interfiled.
 - Must send a memorandum, along with the item which is to be interfiled, that gives:
 - Lot and container number and description of the file/record into which the item is to be inserted.
 - Department, agency, telephone number and name of the person sending the interfile.
 - May send interfiles to the Records Center via I.D. or U.S. mail, or may deliver them in person with no advance notice.

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